



Non-Advice based Sale form

Customer 1

Address:

Customer 2

Address:

Financial review (fact-find)

It is standard practice to carry out a full financial review of all your protection, pension, investment and savings needs before we agree on which product and investment strategy is suitable. You have however indicated that you do not wish to complete such a financial review as you have already determined the precise product you wish to purchase (and/or funds in which you wish to invest) at this point in time. We have not received any information from you, which would normally be required to assess suitability; therefore we are not in a position to determine if the product that you have chosen is suitable for you.

Your specific product choice

You have advised that you wish to take out (name of product) with Irish Life Assurance plc

The product booklet, and any other supporting information which you have been provided with, will explain the main features and details of this product and you should satisfy yourself that the product meets with your needs before your 30-day cooling-off period expires. If you spoke with a member of staff with regard to this product, we would have received certain information from you necessary in determining what product(s) you are interested in. You may have been provided with some information with the product features. This should not be construed as financial advice as we do not know if the product suits your needs. We do strongly recommend you complete a financial review so please contact us if you would like us to arrange a review on your behalf. If you are happy to proceed on a non advice basis, please indicate this by signing the Customer Declaration below.

Non-advice based sale customer declaration

I confirm that

1. I have specified all details of the product I wish to purchase from Irish Life.
2. I have not received any investment advice in relation to this transaction
3. I have read and familiarised myself with the product booklet
4. I wish to proceed with this product as specified on a non-advice basis

Signature of Customer 1

Signature of Customer 2

Date

Office Use Only

Non-advice based sale - Irish Life declaration

I confirm that

1. I am familiar with the requirements for a non-advice based sale.
2. I did not recommend a particular product, product provider or course of action to the customer.
3. I did not provide any investment advice in relation to this transaction
4. I offered the customer the option of a full financial review.

Signature

On behalf of Irish Life Direct Sales

Date